

SHARING A NEW INITIATIVE CHECKLIST

You've been sent some slides or comms about a new initiative and your job is to share it with your team. Preparation is key, if you just 'wing it', you'll be faced with all sorts of challenges and if you can't answer them you put your credibility at risk. Don't leave success to chance, use this checklist to help you craft your message.

Before the meeting

- Review the material you've been sent and put yourself in 'their' shoes.
- What will they think of this?
- How will they feel about this?
- What objections do you think they will have?
- What are the positives of this new initiative?
- Plan your message based on the notes opposite.

At the meeting

1. Manage your state and theirs

This is so often overlooked. State is everything. Before you need to give any 'new' news make sure people are in a positive state to receive the information.

- Check in how people are feeling
- Answer any urgent issues
- Get people sharing ideas and/ or more energised before you start e.g. set a quick challenge, get them moving, get them creative.

2. 'Sell it', AND be honest

- *What's the why?* (Why is this change coming in - what could be the possible benefits?)
- *How does it 'fit' with related work?*
- *Imagine the future* (What will things be like when this is successfully implemented?)
- *Impact* (What impact will this have on the people you are talking to? The good and the bad)

3. Nuts and Bolts

- *What do they need to do?*
- *When do they need to do it?*
- *How will they need to do it?*
- *Who will they need to do it with?*
- *Where will they need to do it?*

Keep it simple; only give the detail that is needed

4. Discuss it

- *How do you think people will respond?*
- *What challenges do you think you'll face?*
- *How can you/we overcome these?*

Allow time for people to openly process what needs to be done and how.

5. Close it

- Summarise main points and action.
- Check everyone agrees and deal with any additional comments

After the meeting

6. Follow Up

Follow up quickly (in person) with anyone you think is struggling with the information.

Follow up (in writing) to make sure everyone has a consistent message